



## *The Employment Training Panel*

# Cal-E-Force External Stakeholder – Prototype Sessions

### Sessions:

May 16, 2019 - 1:30 PM – 3:30 PM

May 17, 2019 - 10:00 AM – 12:00 PM

May 20, 2019 – 1:00 PM – 3:00 PM

### Welcome

Welcome to the External Stakeholder Prototype Sessions for ETMS Contracts to be migrated.

Session Narrator: Kristin Centanni from Guidehouse.

Note taker: Kelsey Oehrke from ETP.

Executive Representatives: Jill McAloon and/or Michael Cable.

Facilitator: Babette Davis.

### Format

Presentation and discussion of prototype screen and data to be collected.

Allow 2 hours.

Webinar with muted mike – use the “raise a hand” function.

### Meeting Structure

The first 3 meetings will use GoToWebinar – instructions for access were sent when you registered.

Designated Q&A throughout presentation.

“Raise a hand” through GoToWebinar.

Ask a question through GoToWebinar.

### Session Goals

Capture the ETMS migrated contract support needs.

Address your inputs/needs/requests, with resolutions being:

In Cal-E-Force.

Not part of ETMS Migration solution – Future considerations.

ETP Policy related and referred to management.

The first phase of the project (and the only phase being addressed) is the migration of ETMS contracts.

This will be done in June 2019.

Need current ETMS data out of ETMS and in Cal-E-Force.

Mirroring the legacy business process where possible.

## Why Salesforce & Cal-E-Force

The benefits of the Salesforce technology:

Is scalable and provides full cloud-computing capability.

Supports fully customized applications.

Provides necessary features required of a State of California IT System.

Has built in infrastructure for security, hardware and connectivity.

Salesforce provides a flexible platform for us to move ETMS contract data to in a short timeframe.

Cal-E-Force will be delivered over time based on external stakeholder and internal staff needs.

## Key Functions for ETMS Contracts

Pre-Application and Eligibility, Application Development, Panel Proposal and Contract:

To be designed or developed.

Not part of the current efforts to Migrate ETMS contracts.

Contract Management, Financial Execution and Close Out:

Focus is on contract execution.

Ability to continue managing ETMS contracts. Processes are:

Enrollments.

Hours Tracking.

Invoicing.

Revisions.

Modifications in this area can be made prior to full launch.

## Live Walkthrough

Video is available on ETP's Website.

## Landing Page (1 of 2)

Simple log in process.

Simple, easy to navigate with quick links.

Link to/from the ETP website.

## Landing Page (2 of 2)

Entry point to all aspects of Cal-E-Force.

Access all parts of Cal-E-Force and migrated ETMS contracts.

## Contract Management (1 of 5)

All contract information in one place, including: contract value, financial information, locations, trainees, job numbers, revisions and invoices.

## Contract Management (2 of 5)

The “button bar” is at the top of the Contracts Detail page and your gateway to managing Enrollments, Hours Tracking and Invoicing.

## Contract Management (3 of 5)

The Contract Details Page contains:

1. Contract Information.
2. Contract Value.
3. Financial Information.

Continued...

## Contract Management (4 of 5)

The Contract Details Page...continued:

4. Entities & Locations.
5. Trainees.
6. Job Numbers.

## Contract Management (5 of 5)

The Contract Details Page...continued:

7. Contract Revisions
8. Invoices

## Enrollments (1 of 3)

Ability to enroll manually.

Ability to enroll using CSV.

## Enrollments (2 of 3)

Reduced amount of data required to enroll.

E.g. Not associating enrollees to occupations.

## Enrollments (3 of 3)

Partial upload success and error management.

## Hours Tracking (1 of 3)

Ability to add hours manually.

Ability to upload hours using CSV.

## Hours Tracking (2 of 3)

Reduced amount of data required to track hours.

Roster #s available but not mandatory.

Simplified from ETMS:

- Removal of class titles (except for CBT hours).

- Simplified curriculum structure.

Retrievable data pertaining to hours tracking:

- E.g. Summary of training hours per trainee.

## Hours Tracking (3 of 3)

Partial upload success and error management.

## Invoicing (1 of 2)

Screen to enter invoice requests.

## Invoicing (2 of 2)

Ability to filter and sort.

Greater transparency around invoice adjustments.

Editable default values on final invoice.

## Request a Revision

Simple way to submit revision requests.

Ability to check the status of revision requests.

All revision details on one page.

## Next Steps

April 2019 Introduction Sessions: 3 working sessions completed.

Prototype Walkthrough Sessions: 3 prototype sessions. Upload walkthroughs to be given next week.

Move to Cal-E-Force and Training & Tailored Support: Email confirmation of assigned support staff. Training to be scheduled. Other modifications if needed.

Keep an eye out for training communications!

Thank You!

Executive-Level Contact, Jill McAloon, Chief Deputy Director will address concerns:

[Jill.McAloon@etp.ca.gov](mailto:Jill.McAloon@etp.ca.gov)

Ideas or Comments:

[ETPCalEForce@etp.ca.gov](mailto:ETPCalEForce@etp.ca.gov)